



MONTEREY-SALINAS TRANSIT REVIEW OF BROKERAGE MODEL FOR MONTEREY COUNTY

Final Report

October 2011



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INTRODUCTION

Monterey-Salinas Transit (MST) is seeking to identify the available transportation resources and the unmet mobility needs of seniors, people with disabilities, low income workers and other transportation-disadvantaged populations in Monterey County and determine whether a brokerage-type model could better match needs to available resources.

Nelson\Nygaard was hired during the summer of 2011 to conduct an expedited analysis of whose transportation need is and is not being served, what resources exist, and to analyze the potential for a brokerage model to utilize available resources in the most efficient manner possible.

The principal finding of this study is that there are not many transportation resources available beyond MST services that can be “brokered.” Further, the field has evolved beyond simple brokerage in recent years to a mobility management model to best match people with the most appropriate services. MST already has a number of mobility management programs in place and this report concludes with a menu of options of how the mobility management programs could be expanded and further tailored to fulfill unmet trip needs in the county.

MET AND UNMET TRANSPORTATION NEEDS IN MONTEREY COUNTY

Transportation Disadvantaged Populations

The population of Monterey County is 415,000, of which 10.7% are 65 and older according to the 2010 US Census. This is slightly below the statewide average of 11.4%. However, there are areas of the County where there are much higher concentrations of seniors. For example, on the Monterey peninsula and in areas to the southeast, over 20% of the population is 65 years and above, as shown in Figure 1 below.

According to the last AMBAG projections, the senior population in the County is expected to nearly double by 2030 (87% growth), growing at a much faster rate than the population as a whole (20% growth).¹ Accordingly, the population 65 and older is projected to make up a much larger share of the overall population by 2030 (17%) and therefore their special transportation needs will only become more prevalent in coming years. As shown in Figure 2 below, the population 70-79 is expected to grow at a much faster rate (112-114% growth) than the population 65-69 years of age (20-60% growth). The population over 80 is expected to nearly double (92% growth).

This has significant implications for transportation needs in Monterey County. Currently, seniors in the County drive themselves for many of their daily trips. The incidence of disability increases significantly in the 75-85 year bracket. Therefore, as the baby boom ages according to the projections described above, the senior population will not only grow, but the portion of seniors who will not be able to drive will increase. Many of these seniors live in areas that are remote and difficult to serve through traditional transit services. This will create a wave of new paratransit users and needs for other alternative transportation options. Transportation affordability is another major issue for aging populations whose incomes become fixed as they retire.

¹ Source: Association of Monterey Bay Area Governments Monterey Bay Area 2008 Regional Forecast:
http://www.ci.salinas.ca.us/visitors/pdf/population_chart.pdf

Figure 1 Percent of Population 65 and older in Monterey County

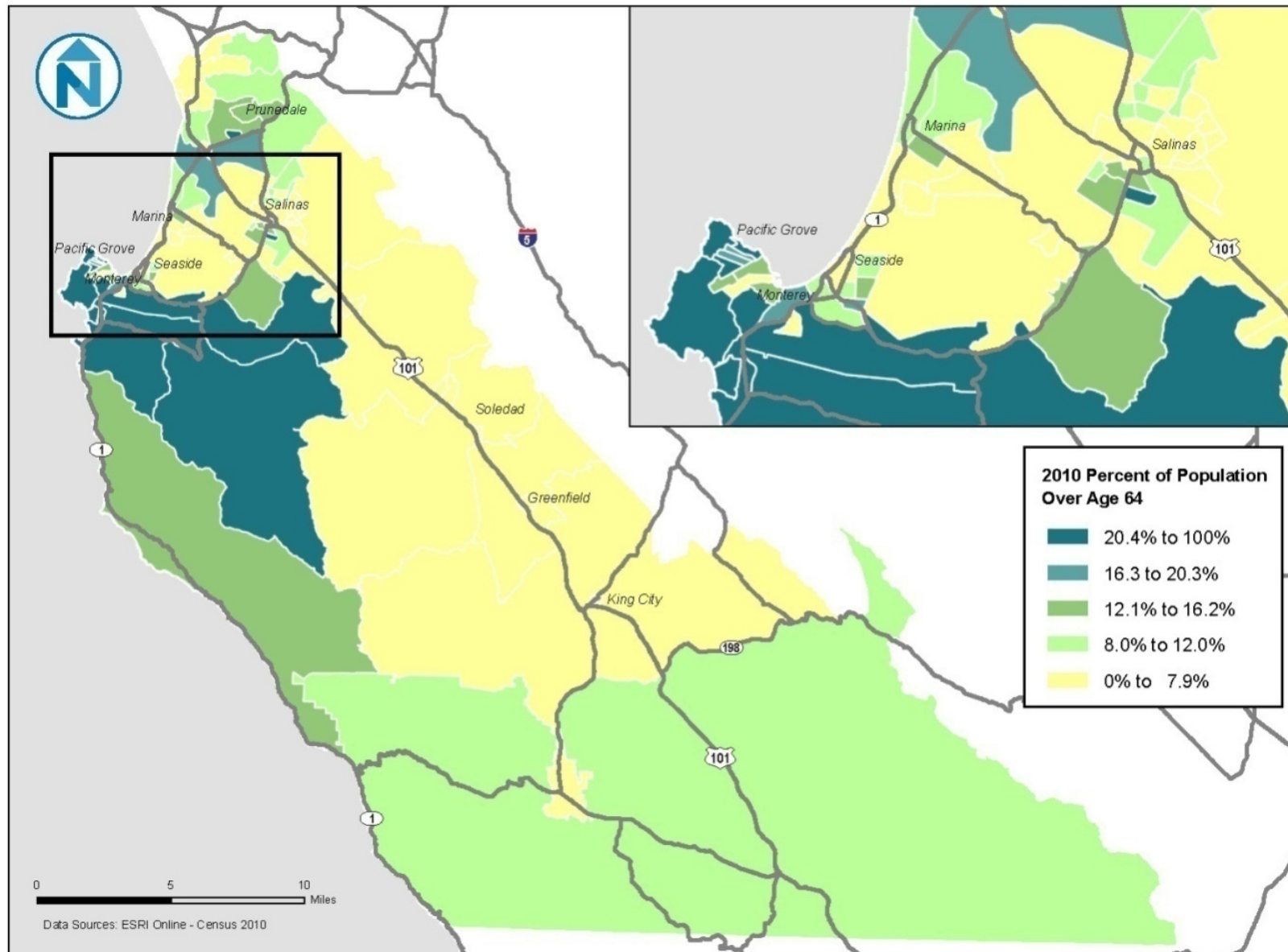
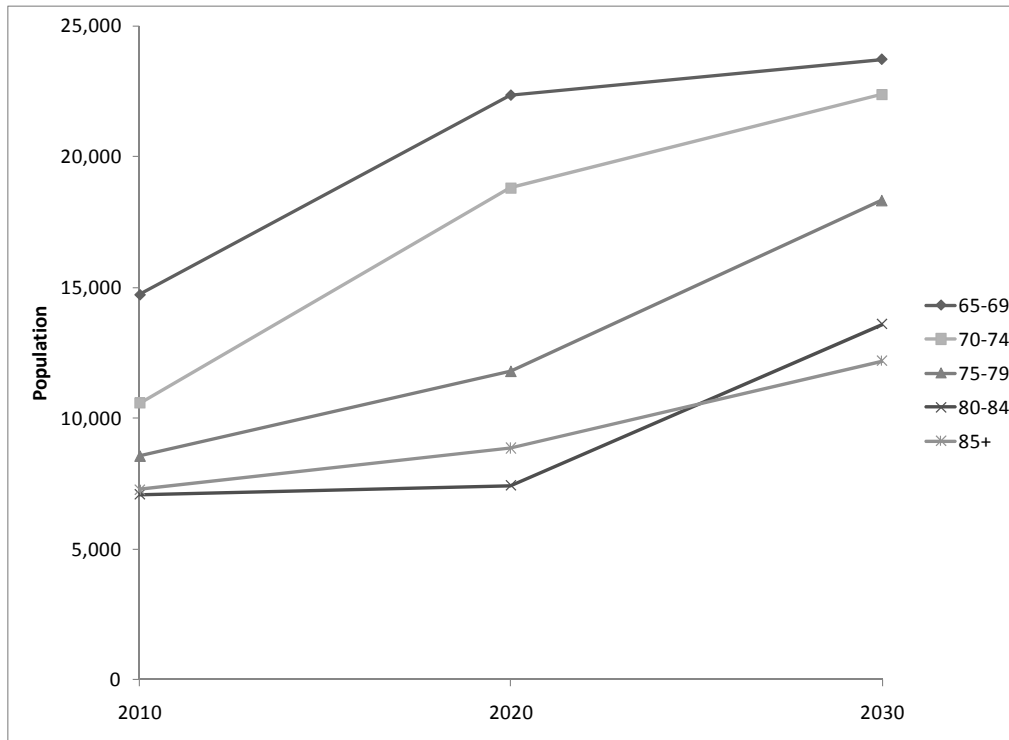


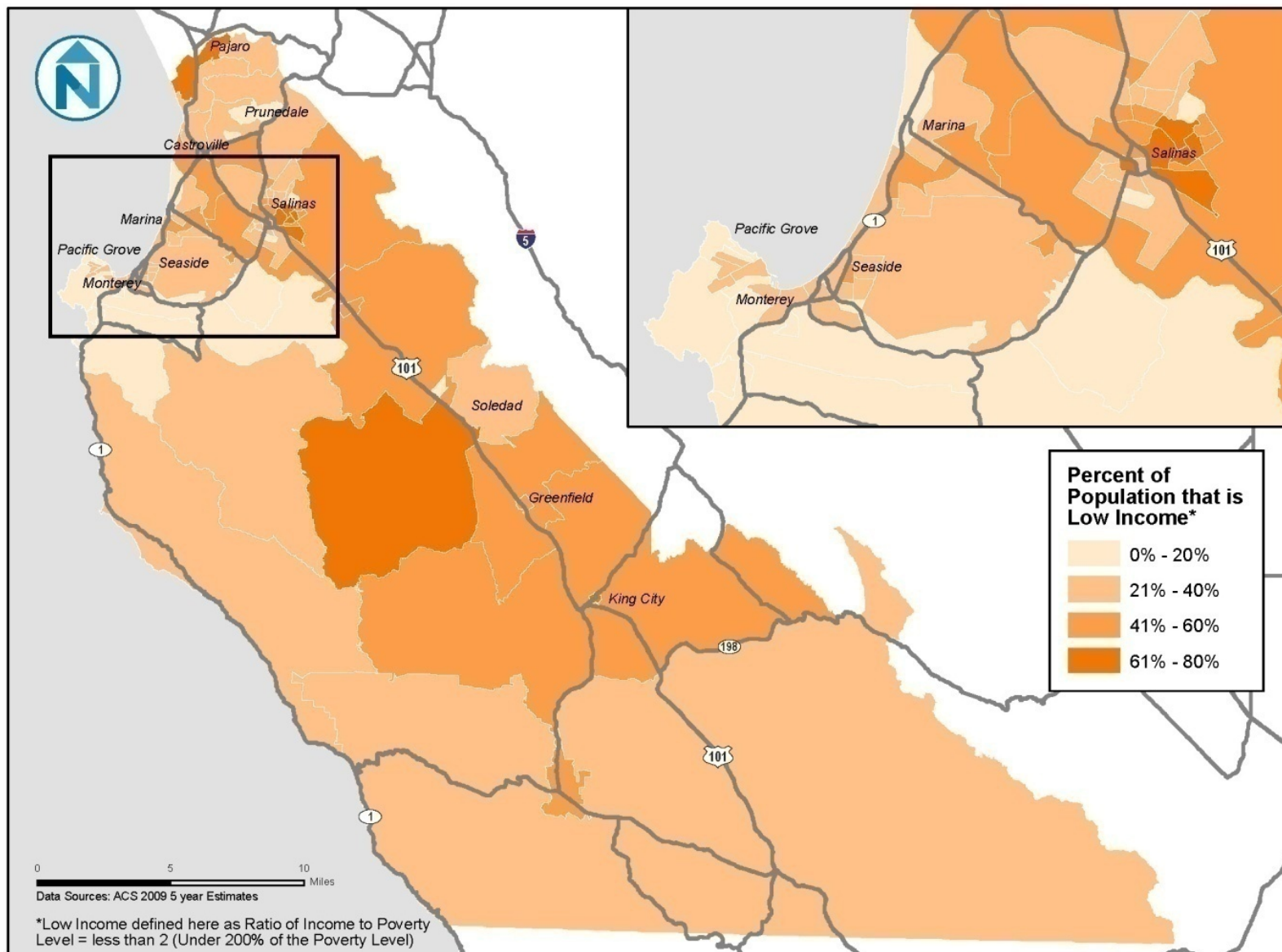
Figure 2 Projection of Aging Population in Monterey County



The Monterey peninsula is consistently ranked as one of the most expensive places to live in the United States. The County’s median income is significantly higher than the statewide average (\$78,000 versus \$60,000); however the percentage of the population that is low-income (households earning less than \$25,000 per year) is almost the same as the statewide average of 20%. Therefore, the low-income populations in the County may be particularly pressured in such a high cost area, making affordable transportation options paramount. According to the Coordinated Public Transit-Human Services Plan (hereafter referred to as the “Coordinated Plan”), “the majority of those with the greatest economic need reside in Salinas, Castroville, Pajaro, Marina, and Seaside.” An illustration of concentrations of low income population (defined as percent of the population earning less than 200% of area median income) is shown in Figure 3 below.

Over half of Monterey County’s population (55.4%) identifies as Hispanic/Latino (2010 US Census) and 43% of the county’s population speaks Spanish at home. There is a large agricultural worker population that is largely non-English speaking, or at least not fully fluent in English. These low-income populations are often challenged by the high costs of travel in such a low density County. Low-income agricultural workers have to travel long distances for their work, and often have multiple jobs, requiring multiple long trips in one day. Agricultural areas are typically underserved by public transportation agencies for many reasons: it is often difficult to serve rural and agricultural areas due to dispersed uses and remote destinations, seasonality of demand, complex hours of operation, poor quality road infrastructure and lack of sufficient demand to run cost effective routes. Affordable, convenient options for these workers is a key transportation need in Monterey County.

Figure 3 Monterey County Percentage of Low-Income Population



Further, as highlighted in the 2008 Coordinated Plan, even for “those who live in the County’s more affluent areas, such as Pebble Beach, Carmel-by-the-Sea, Carmel Valley, Monterey and Pacific Grove, the rising costs of transportation, health care, food, and other standard costs of living place many of these elderly in a “land rich, cash poor” situation.” These factors indicate a need to address the transportation needs of populations who may live in remote parts of the County and may have real estate assets, but insufficient liquid assets to afford day-to-day needs.

Summary of Transportation Needs in Monterey County

In summary, Monterey County has a wide range of populations who may be disadvantaged in terms of their access to affordable, accessible transportation options to meet their daily needs:

- **Accessible Service and Travel Training:** There is a growing aging population, with especially high growth expected in the portion of the population 75 and older, most of whom currently rely on automobiles to get around. As these residents become less mobile, they will increasingly depend on public transit and other transportation options which are accessible and easy to use for older individuals who may have never travelled by any other mode aside from driving in the past. Not only ensuring accessibility of services, but also providing travel training and educational materials are crucial for these populations.
- **Affordable Service and Bilingual Information:** There is a significant low-income, Spanish-speaking population who need access to affordable transportation options and readily available bilingual information about their transportation options. Affordability is especially critical for large families who have to transport multiple people.
- **Frequency, Coverage and Service Hours:** Lower-income parents who may be making chained trips on public transportation to drop children at school, accomplish daily shopping, and pick children up, depend on transit frequency and coverage to make these types of trips possible. Hours of operation are a key issue for low-income populations who have irregular, and often long, work hours. Further, for those working in the agricultural industry, their places of work are often in remote and rural locations that are difficult to access via fixed route transit. Unconventional solutions often have to be explored for these populations.

According to MST RIDES staff, the needs of many of the transportation disadvantaged populations in the County are served by various social service agencies. However, there are isolated populations who live deep in hills or canyons that are hard to access, and those who are difficult to serve because of language barriers, who may not be represented by existing advocacy organizations. The needs of these populations may need more analysis and specialized attention to make sure they are not overlooked.

Specific transportation needs that were identified in the 2008 Coordinated Plan were: expanding service to underserved locations and increasing the frequency and hours of operation of existing routes; providing same day paratransit services; establishing mobility management programs; replacing old vehicles; and providing transportation services to farm workers. (p. iii)

Needs identified for Monterey County specifically were:

- Same Day Transportation
- Door-through-Door Services

- Guaranteed Ride Home Programs
- Increased Frequency and Coordination of Services
- Mobility Management Centers and Travel Training
- One-Stop Information (511) Service (bilingual)
- Accessible Taxi Service
- Replacement of Old Vehicles
- Ability to use Available Vehicles and Drivers Regardless of Funding Source
- Emergency Response for Transportation-Challenged Consumers
- Agricultural Work Vanpools
- Senior Community Special Transportation

TRANSPORTATION RESOURCES

MST Services

Transit service coverage is good in some parts of the County, particularly in Salinas and Monterey. Transit achieves relatively good coverage on the Monterey Peninsula and is relatively sparse in much of the rest of the County, especially in South County. There are many remote parts of the County that have no transit service.

Monterey County pays for a special extension of MST RIDES paratransit service to ensure that paratransit is available in some more remote parts of the County, namely areas of unincorporated North and South Monterey County that are not well served by fixed route and would not otherwise have paratransit service. However, unmet rural paratransit needs remain.

Since the 2008 Coordinated Plan, MST has taken steps to fill the identified unmet transportation needs. They have applied for grants and established a number of new services, described in the figure below.

Figure 4 MST's Mobility Management Programs²

Program Name	Description	Eligible Population	Notes
Medical Trips	Twice per month trips to San Jose medical centers and San Francisco medical centers. Must reserve in advance. The round-trip fare is \$40 payable in cash or with MST Special Medical Trips tickets.	All Monterey County residents	n/a
Taxi Voucher Program	Eligible customers pay \$3 for \$15 worth of taxi vouchers, same as a paratransit trip. While there is currently no limit on vouchers per customer, this may be changed by the cities that manage the taxi voucher programs.	Seniors and people with disabilities	Current taxi program (reimbursement system) in process of phasing out; transition will be complete in fall 2011. No real fraud protection-concern with new 15% taxi paratransit trip requirement. Screening process is separate from the ADA process, which may need further examination If vouchers are not in smaller denominations than \$15, this could represent a waste for riders taking short trips.

² MST webpage: <http://www.mst.org/mobility/ada-paratransit-rides/>

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Program Name	Description	Eligible Population	Notes
Regional Taxi Authority	The Taxi Authority conducts vehicle inspections and driver background checks, operates as a one-stop permitting center, collects fees, monitors insurance coverage, sets the fare structure, and conducts public outreach and education efforts.	n/a	Currently housed at MST. It may eventually move to police departments.
Seniors Shuttle	Operates Monday-Friday on two routes: AM: Line 91 Pacific Meadows-Ryan Ranch; PM: Line 92 Pacific Meadows – CHOMP Primary service area is Carmel and Monterey but extends as far as Ryan Ranch.	Designed for seniors, open to the public.	Not listed on Route List on website. This shuttle was designed and continues to be modified with input from the senior community in Monterey County.
Bus “Navigators”	MST Navigators are volunteers who help train people with disabilities and travel challenges to use MST’s fixed-route buses. Volunteers who commit 60 hours/year (at least 12 hours/month) receive a free 31-day Super GoPass.	n/a	n/a
Travel Training	Travel training to individuals, groups and organizations. Three types of training advertised: <ul style="list-style-type: none"> • General Fixed-Route Travel Training • Destination-Specific Travel Training • Mobility Device Travel Training RIDES travel trainings are also performed in combination with the paratransit eligibility assessments.	Monterey County residents.	It is important to have a follow up mechanism in place for internal tracking purposes and to show results for grants. More robust recruitment for travel training is another area for examination.
Fixed Route Transit Subsidies	“Courtesy Cards” are available to all disabled individuals free of charge. Card holders get a 50% discount on bus passes, while ADA-eligible riders travel for free on fixed-route.	Disabled individuals with a physician’s written verification or a Medicare Card.	
Grant for two accessible taxi cabs	To enhance accessible transportation options in Monterey County.	n/a	Grant has been acquired. Waiting for MV1s to be approved by FTA Region 9 to enable purchase.

These programs were primarily intended to address the following gaps:

- Same Day Transportation
- Mobility Management Centers and Travel Training
- Accessible Taxi Service

- Replacement of Old Vehicles
- Emergency Response for Transportation-Challenged Consumers
- Senior Community Special Transportation

Other Services

There are not a large number of other transportation service providers in Monterey County. Aside from MST's fixed route service and accompanying RIDES paratransit service, there are interregional transportation providers such as Greyhound and Amtrak, the San Andreas Regional Center which serves multiple counties including Monterey, medical transportation through the Veteran's Administration and Community Hospital of Monterey Peninsula, and a variety of community organizations that offer relatively limited transportation services for their clients and members, including information and referral, transit discounts and van services.

The consulting team updated the list of transportation resources in Monterey County from the 2008 Coordinated Plan through web research and calls to service providers. The team also conducted a brief survey that was distributed through MST staff to community organizations. There was low response rate and the survey did not identify any new information on available transportation resources in the County. The updated list of all the transportation resources available in the County is shown in figure 6 at the end of this chapter.

A number of the organizations that were listed as resources do not directly provide services and have therefore not been included on the list. However, these organizations could be potential partners for the new taxi voucher program and information dissemination. They are:

- Casanova Oak Knoll Park Center, Monterey
- City of Monterey Recreation and Community Services Department
- City of Seaside/Community Services
- Monterey Senior Center
- Central Coast Alliance for Independent Living
- The Blind and Visually Impaired Center of Monterey
- Salinas Senior Center

It appears that an agricultural vanpool service may be starting up in Monterey County based on the successful Kings City model (described further below). If successful, this would be a significant new transportation resource in the County that would fill a persistent unmet need. While MST's role in relation to the new program remains unclear to the consulting team, staff should continue to explore this possibility and ensure maximum coordination with the service (also discussed further below).

BROKERAGE MODELS

This project was undertaken to explore the feasibility of initiating a brokerage service in Monterey County to better utilize existing transportation resources in the County. The current state of the practice in the field has evolved beyond the brokerage model to a model of mobility management to best match people with the most appropriate services. MST already has a number of mobility management programs in place, as described above. As such, the stated goals of such a system, according to MST staff, would be the following:

- A mobility management program should be a means to provide planning, coordination and sharing of resources, not direct service, e.g. more partnerships with non-profits.
- A mobility management/brokerage model should aim to create efficiencies and help current programs, which are funded through limited-duration grants, become self-sustaining through sharing of resources and cost efficiencies. The long term sustainability of these programs is a concern for MST staff as there is no guarantee that grant funding will be renewed or replaced with other funding sources.
- A brokerage-type system would enable MST to bring scheduling and possibly dispatch of their paratransit services in house, which would give MST greater ability to monitor, and possibly control, costs. However, most agencies that have incorporated these functions are larger in scope than MST.
- As the local Consolidated Transportation Service Agency (CTSA) for Monterey County, MST seeks to provide the best suite of services to meet the unique needs of Monterey County's transportation disabled populations. The staff is continually seeking better knowledge of these needs and the existing resources to meet those needs and this is an additional step in this direction.

Brokerage Models Review

The consulting team examined various CTSA, brokerage and mobility management models to explore potential brokerage and coordination opportunities for MST. These efforts would be directed towards serving the mobility needs of people with disabilities, seniors, low-income populations, and other transportation disadvantaged populations. In each case, both current operations as how they have evolved over time are described, where possible. Because many of these programs started on a much smaller scale than current operations, their initial steps to improve coordination may be most immediately relevant for MST. These programs' current operations represent an excellent vision for MST's future role in the County.

Five models were reviewed:

- Ride Connection, Portland, Oregon
- Ride-On, San Luis Obispo, California
- Special Transit, Boulder, Colorado
- Outreach, San Jose, California
- Paratransit, Inc., Sacramento, California

Each of the programs is described below and all the programs are summarized in a table at the end of this discussion.

Ride Connection, Portland, OR

Ride Connection is a nonprofit organization based in Portland, Oregon, that links people with disabilities and seniors to transportation options throughout the tri-county Portland metro area. Ride Connection has served this coordinating function since 1988. Below is a brief summary of the principle parameters of the program³:

- **Coordination/Contracts:** Ride Connection holds three different kinds of contracts with its partner agencies:
 - **Rural** - in areas where nonprofits are not able to provide transportation but there is a local taxi company willing to participate.
 - **Operational** - forms the bulk of service provision. (Note: While Ride Connection receives most trip requests for partner agencies, it does not impose this as a requirement on partners, who may have specific reasons for preferring to take requests (e.g., some prefer clients to call their own agency as they may also have non-transportation questions).
 - **Vehicle-only contracts** - Ride Connection acquires Section 5310 vehicles, and requires that agencies provide a specific volume of monthly trips on those vehicles.
 - Additionally, in a more technical assistance role, Ride Connection has worked with partner agencies to set up half a dozen community based shuttle programs, and provides various forms of assistance to sustain these services.
- **Direct Services:** In addition to brokering trips, Ride Connection provides the following three direct services:
 - **One-stop call center**, which provides information and referral and schedules trips on partner agency vehicles
 - **Travel training program**
 - Operation of a **small demand-response and shuttle service** (three drivers, \$175,000 annual budget, 15,000 annual trips)
- **Trips:** Provides 371,000 annual trips, primarily through partnering with 30 agencies for the provision of trips (96% of total). Provides some direct service for trips that can be done more efficiently than through a contractor.
- **Staffing:** Ride Connection has 37 employees, of whom seven are part-time
- **Funding:** Tri-Met (transit agency for tri-county region), State Department of Transportation, donations/fundraisers, and foundations.
- **Costs:** The cost/trip (\$13.32, including administration), is much lower than the ADA paratransit service, which partly explains Tri-Met's significant financial contribution to the agency.
- **History:** It is important to note that the service started much smaller, with only six partner agencies, providing 11,000 trips in its first year, almost exclusively through volunteer drivers. In 2000 Ride Connection still only had 6 employees, but has grown considerably since then.

³ Based on interview with Julie Wilcke, Ride Connection's Mobility Manager.

Ride-On, San Luis Obispo, CA

Ride-On is a nonprofit operated by United Cerebral Palsy (UCP) of San Luis Obispo. UCP was designated as the CTSA for the county in 1987. In contrast to Ride Connection, Ride-On is primarily a direct service provider and serves as a one-stop point of connection for most elderly and disabled transportation services outside of the ADA paratransit program.

- **Direct Services:** Ride-On provides social service transportation (through the CTSA umbrella) in addition to general public transportation (through the public-private operation of a Transportation Management Association [TMA]), which includes airport shuttles, “lunchtime express” service, guaranteed ride home, visitor shuttles, agricultural and other vanpools.
- **Contracts:** Two anchor contracts provide substantive financial support: the Regional Center (for people with developmental disabilities) and Medi-Cal transportation.
- **Coordination:** In addition to ride requests (on four phone lines), Ride-On gets about 20 calls daily for information. Rather than just giving the phone number of other services, Ride-On either arranges the trip and calls back the person, or transfers them directly to other services.

In order to develop the mobility manager function as part of their CTSA role, Ride-On explored with other agencies how Ride-On could support their services. Ride-On acts as an ambassador (seen as a neutral entity), and holds regular meetings with the staff persons providing transportation at various social service agencies. If Ride-On discovers that rides are being denied at a specific agency, staff will explore the problem with the agency and determine if there are other agencies that have available capacity. If the ADA paratransit program cannot serve an individual because they are not eligible, they call Ride-On to see if they can help.

Ride-On is moving even farther towards a mobility management type model. The agency hired a person officially called a Social Mobility Manager to better disseminate information about transportation resources to stakeholders in the county, particularly focusing on educating dispatchers at social service agencies. They plan to create a Resource Notebook (electronic and hard copies) and a DVD, which will be updated quarterly. This will be made available to all dispatchers throughout the county’s human services network. This position will be housed at the Regional Rideshare program, which operates the 511 line. All calls besides traffic and transit questions will be referred to the Social Mobility Manager. Over time the plan is for social service agencies to also direct their calls to this number rather than to Ride-On.

- **Trips:** 310,000 annual trips provided (60% are for the CTSA functions and 40% for the TMA)
- **Staffing:** Staffing consists of the Executive Director, Operations Manager, Transportation Coordinator, three dispatchers, two business department staff, and 55 drivers
- **Funding and Costs:** Of the \$5M annual budget, only \$0.5M is derived from the CTSA. The Regional Center contracts bring in about \$2M, in addition to Medi-Cal, and TDA. Ride-On uses TMA funding to subsidize CTSA programs. The CTSA covers the cost of drivers, fuel, insurance, and charges the TMA \$40/hour. The TMA in turn charges \$68/hour to agencies/groups/vanpools that use their services.

- **History:** From 1987-92, United Cerebral Palsy was the CTSA, providing very limited service to its own client population in the evenings and on weekends (20 trips per month). The COG said they should be doing more to bring together social service transportation, which provided the impetus for the establishment of Ride-On. Staff initially documented the amount of funding being spent on transportation by all social service agencies in the county and calculated potential savings if functions such as insurance, maintenance, and administration could be pooled.

Ride-On started as a cooperative in 1993, when UCP joined with two other social service agency transportation providers, using their vehicles to replace their leased fleet, and one employee from each agency joined Ride-On. Ride-On paid agencies \$0.25/mile to provide the drivers, while the CTSA provided maintenance, administrative services, the facility, and scheduled trips.

In the first year there were just 6 or 7 partner agencies, mostly calling in for rides. Since UCP had merged with the providers that already had fleets, they were able to provide trips for these agencies, primarily to medical destinations.

Special Transit, Boulder, CO

Special Transit is a private, nonprofit organization that provides trips to a broad range of customers in Boulder, all of whom self-declare as either having a disability, are seniors, low-income, or have a life circumstance that prevents them from traveling to their destination. The program serves this population with paratransit services, a travel training program, and also brokers with a couple of agencies to provide volunteer driver programs.

- **Coordination:** Special Transit serves as a one-stop location for all trip requests. Three brokered programs:
 - **American Red Cross** – American Red Cross recruits volunteers and provides vehicles, insurance, and maintenance. Special Transit takes trip requests, develops schedules, and trains volunteer drivers.
 - **Family and Friends Mileage Reimbursement Program** – For hours/areas not covered by the paratransit program: the rider finds the driver/volunteer, gets reimbursed and passes this on to driver. This avoids the liability issue for the agency.
 - **RSVP** – RSVP provides volunteers and insurance, and Special Transit refers approximately 2,500 passengers annually.
- **Services:**
 - **Paratransit Services**
 - **Travel Training Program** – A Mobility Specialist contacts all new ADA paratransit registrants and helps them develop individual travel plans that go beyond paratransit, if the registrant is able to use those services. In follow-up interviews, 35-40% report having used non-paratransit options (Initiated in 2008 funded through New Freedom Fund)
- **Contracts:** In order to financially sustain these programs, Special Transit has a number of revenue-generating (“earned income”) contracts, including providing 20% of access-a-Ride’s (the ADA paratransit provider) trips, and the hybrid demand-response Call-n-Ride program under contract to the Regional Transit District (RTD). Special Transit also has a

contract with the City of Boulder to provide downtown shuttle service, known as the HOP.

- **Trips:** 125,000 annual paratransit trips; approximately 1,200 annual trips are provided through a taxi program; approximately 5,000 annual trips through American Red Cross; approximately 2,500 passengers referred annually to RSVP.
- **Staffing:** Special Transit has approximately 230 employees.
- **Funding:** The largest funding sources are the County, RTD, and donations, in addition to almost 20% of the budget which is covered by earned income contracts.
- **History:** Early successful collaborating with American Red Cross set a solid foundation for the program's growth.

Outreach, Santa Clara County, CA

Outreach, a nonprofit organization, is over 30 years old (began in 1979). The organization was founded during the War on Poverty movement and started as a social service program. Their vision is to solve community transit across all populations, and although they have maintained their vision, the external environment has changed, and they have built dynamic relationships among stakeholders to maintain their relevance. Outreach serves all of Santa Clara County, including San Jose.

- **Services:** Their programs include a number of social service and transportation programs. Among social service programs, for example, they offer Senior Outreach, which provides benefits counseling (social security and other entitlement programs such as Medi-Cal or Medicaid), advocacy and other services (housing and food) to low-income older persons needing assistance getting through bureaucratic red-tape. Their transportation programs include the Senior Transportation Program offering paratransit rider fare subsidies, public transit passes, subsidized taxi services; operation of the ADA paratransit brokerage for Santa Clara Valley Transportation Authority (VTA), and a set of after-school and JARC transportation programs.
- **Coordination:** Outreach has a one-stop call center. As part of their brokerage function, they manage their contract's direct services and do vehicle sharing and cost sharing. Outreach is responsible for trip assignments, trip volumes and trip allocation. They have found that the more they control directly, the more cost effective their business model is. They also do eligibility evaluation and register people.

Outreach has also built their own information technology business system for this brokerage/mobility management model. Their entire system has been paid for and they have been able to divide up its costs based on the various funding sources. They use Trapeze for dispatch and scheduling, but tracking and routing are done using their own tools.

- **Contracts:** All of Outreach's direct delivery is by contractors/partners. Outreach owns 270 vehicles. They secure the vehicles for their partners by using their grants and then rent vehicles to providers (\$1 a year) or they lend them to them. They also broker rides to taxi and other private providers' vehicles.
- **Trips:** All of their contracts combined produce 1 million trips annually.

- **Staffing:** The organization is small: the total administrative staff is 7 people (three people who answer phones, 1 account manager; 2 funding and operations staff; 1 executive director)
- **Funding:** ADA paratransit is funded with local public transit money. Other funding sources include JARC, TANF, New Freedom, Council on Aging, County Nutrition, Healthy Neighborhood, and public health funds. They take all of their funding sources and match the dollars for each trip to the appropriate sources. Outreach does grant writing in-house.
- **Costs:** Costs for ADA paratransit trips average \$24 per person (in 2009); for senior and other trips, they average \$19 per person. Their average trip distance is nine miles, but some people travel as far as 30 miles one-way.
- **History:** Their success came about from their early start as an anti-poverty agency, which had already established partnerships with a broad range of agencies. Their greatest challenge has been finding operating dollars to meet the demand on their programs.

Paratransit, Inc., Sacramento County, CA

Paratransit, Inc. is the CTSA for the transit district portion of Sacramento County. A second CTSA covers the portions of Sacramento County outside of the transit district, and is overseen by the County Public Works Department. The organization is a nonprofit, founded in 1978. When the organization was started, the goal was to create a transportation entity that would do the things that ultimately would become the CTSA's responsibilities. They started with a consolidated maintenance function and operating limited transportation services themselves.

- **Services:** Paratransit, Inc. is the CTSA, approximately half of their business, and also the ADA operator for Sacramento Regional Transit (RT).
 - **Paratransit:** Sacramento RT handles the eligibility process, Paratransit, Inc. provides all other paratransit functions for RT.
 - **Cost-Sharing:** In the role of CTSA, Paratransit Inc. primarily has partnership agreements with social service agencies for cost sharing depending on the services offered to their clientele.
 - **Vehicle Maintenance:** They have agreements with 50 organizations to provide maintenance for their vehicles. They also have loaner vehicles to fill gaps when needed.
 - **Travel Training:** Since 1983, travel training has been a sizeable component of what they do. They have trained thousands of people over the years and do training for Spokane, SJRTD, VTA and Honolulu.
- **Mobility Management:** Paratransit, Inc. seeks to direct people off of paratransit to lower cost alternatives that they broker and operate if possible. They have a grant to establish a mobility management center in-house that would allow them to set up a one-stop call center for consumers.
- **Contracts:** 15 different agencies are under contract to provide service for them. United Cerebral Palsy (UCP) is their largest partner and Paratransit, Inc. houses UCP's transportation function in their building.
- **Staffing:** Paratransit, Inc. has 230 employees. In addition to their call center, they have 25 employees in maintenance, 180 drivers and 15 people who administer their programs.

- **Funding:** The CTSA has two major funding sources: TDA Section 4.5 and local sales tax. They have also been successful in attracting grant funding: JARC, 5310 (every year they get 8 or 10 buses out of 5310), New Freedom, etc. The maintenance function is a revenue-positive operation.
- **Performance:** On their ADA paratransit side, productivity is 1.61 passengers per hour; for the CTSA, it is 4.76.
- **History:** Between 1978 and 1981, Paratransit, Inc. operated their own service, and RT had its own paratransit service. Their first partner was the Community College, so they negotiated an agreement with them whereby the Community College District owned two buses and gave them to Paratransit, Inc. which in return carried their students as the number one priority for their service. In 1981, Paratransit, Inc. took over all complementary paratransit operations and RT went out of the paratransit business. They restructured their Board of Directors based on a four-party agreement between the City of Sacramento, SACOG (the MPO), RT, and Sacramento County.

BROKERAGE POTENTIAL IN MONTEREY COUNTY

Given the scarcity of existing resources in the county pursuing a model of simply brokering existing services is unlikely to yield much success. Further, all of the above models are non-profits, and MST would have to follow a somewhat distinct model to initiate a full mobility management or brokerage model. However, there are opportunities for continued mobility management in Monterey County that would enhance the mobility of transportation disadvantaged populations. These strategies are especially promising given MST's successful track record with their current mobility management programs:

- **Agricultural Vanpools:** Within the last decade, a very successful model for agricultural vanpools that provide safe, affordable and relatively convenient transportation for agricultural workers has emerged in the Central Valley of California. The Agricultural Industries Transportation Services (AITS) provides agricultural workers in Kings, Tulare and Fresno counties with safe, affordable vans they can use to drive themselves and others to work.⁴ The project was originally funded by Caltrans through a federal Job Access and Reverse Commute (JARC) grant from the United States Department of Transportation (Federal Transit Administration) in November of 2000 to implement agricultural vanpool pilot projects in these counties.⁵ The program has been very successful. Initially the pilots had to overcome some significant legal and institutional barriers, efforts that have paved the way for implementation of similar programs in other agricultural communities in California. Our understanding is that there are already efforts underway to establish agricultural vanpools in Monterey County, and that MST is examining an appropriate role in this process.
- **Guaranteed Ride Home:** Guaranteed Ride Home (GRH) was a specific transportation need that was highlighted in the 2008 Coordinated Plan. GRH programs fill a very important mobility role by providing people with rides home in emergency circumstances; perhaps more importantly, they enable people to more confidently use public transit because they do not have to worry about being stranded if something does not go according to plan. Monterey County has a GRH program to encourage commuting by alternative modes for employees. MST should consider working with Commute Alternatives to extend this program to seniors and people with disabilities as a safety net.
- **Hospital Discharge Transportation Services:** Another more specialized GRH program that has been implemented in Alameda County is the Hospital Discharge Program. This program addresses the needs of people who are discharged from a hospital and need accessible transportation. It also assists people with disabilities who are admitted on short notice into a hospital, and then discharged soon thereafter without having made transportation arrangements. The Alameda CTC has entered into a contract with a private paratransit provider to make accessible vehicles available at short notice. The Alameda CTC conducts in-service training with discharge planners at participating hospitals, and sells the hospital low-cost vouchers with which to pay for the rides. Discharge planners provide patients information about paratransit, assist them in completing an application (approximately 75% of discharged patients are not already

⁴ AITS webpage: <http://aitsvp.com>

⁵ Agricultural Industries Transportation Services (AITS) Statewide Needs Assessment Study Final Report, Business Transportation and Housing Agency, California Department of Transportation Agricultural Worker Needs Report, May 2003, p. 67

- registered with a paratransit program), and schedule the ride with the provider. While this serves a small number of residents—approximately 180 trips are provided each year—the program is a lifeline for those who have no alternatives, and represents a great savings to the hospitals that would otherwise need to pay substantial amounts for ambulance services or taxi vouchers.
- **Medical Return Trip Program (MRTP):** Also in Alameda County, a significant problem for East Bay Paratransit users was estimating the end time of their medical appointments. Due to the lack of control over the duration of an appointment, riders were either building in substantial cushion to ensure that the vehicle would not arrive before they were ready, or were missing trips repeatedly. MRTP was created to allow riders to book one-way paratransit trips to medical appointments, and then call a taxi that participates in the subsidized taxi program for the return trip.
 - **Paratransit Waiting Areas:** The lack of designated waiting areas for paratransit pick-ups at medical facilities frequently results in missed trips as drivers and riders wait in different locations. The city of Fremont established a program to coordinate with hospitals that were willing to designate pick-up/drop-off locations for paratransit services. Technical and financial assistance was offered to hospitals to help with the design of the pick-up/drop-off locations, including signage, paint treatments, placement of street furniture. However, in most cases in southern Alameda County the hospitals installed the improvements at their own expense. In the remainder of the County, despite concentrated efforts to interest medical facilities in these improvements, very little interest was shown and no tangible improvements resulted from the program. It is not coincidental that the most interest came from one of the most dispersed and least dense parts of the County. This indicates potential for implementation in Monterey County due to comparable land uses in certain areas.
 - **Volunteer Driver Program:** A key need identified in the 2008 Coordinated Plan was door-through-door services. A volunteer driver program would be a significant resource in the County. These are most successful in partnership with a non-profit organization. The first step in the establishment of such a program would be to identify a non-profit partner that already has a well established volunteer program. This volunteer driver program could build on and/or combine with the existing “ambassadors” volunteer program currently operating at MST.
 - **Information Dissemination:** MST could work to improve the agency website to advertise the rich resources already available. For example, the senior shuttle could be advertised where regular transit routes are advertised. In addition, more attention could be paid to disseminating transit information throughout the many social service organizations. The information available to the 211 service should be re-examined to ensure that all transportation services are robustly advertised and clearly described, particularly as a result of recent expansion of the mobility management services. Our impression is that there is not a clear one-stop shop role even for the services that are currently offered.
 - **Organizational Support/Assistance for Building Transportation Resources:** Since there are currently a limited number of transportation resources available in Monterey County, MST could seek to work with community organizations to build new services. Like Ride Connection in Portland, MST could acquire Section 5310 vehicles on behalf of social service organizations who are seeking to expand their transportation

functions. The agency could work with them to ensure that the service is well advertised and, like Portland, require a specific volume of “ADA-type” monthly trips on those vehicles. MST has a good track record with winning grants and may have success in securing the necessary capital for this program.

In a “technical assistance” role similar to Ride Connection, MST could work with partner agencies to set up community based shuttle programs, or services similar to the dial-a-ride programs currently operating in South County, and then provide assistance to sustain these services. This could be in the form of maintenance, fuel, or driver training.

CONCLUSION

While there are clearly benefits to the brokerage model, or in its more current form, mobility management, to a large extent the conditions that need to be in place for a substantive expansion of the current Mobility Management function are not present in Monterey County. There is no dense urban core (as is found in Portland, San Jose and Sacramento), or a wide range of existing transportation services with unused resources (as was the case in San Luis Obispo or Boulder Colorado).

As stated earlier, MST already has a number of mobility management programs in place, and these are gradually expanding in scope. This report provides a number of options that MST should consider and potentially customize to fulfill unmet trip needs in the county.

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Figure 5 Summary of Mobility Management/Brokerage Case Studies

Organization/ Agency	Location	Services Provided	Year Started	Budget	Staffing	Annual Trip Volume	Board Size/ Composition	Funding Sources	Model Features/Lessons Learned
Ride Connection	Portland, OR	<ul style="list-style-type: none"> One-stop call center (information and referral and trip scheduling) Travel training Small demand-response and shuttle service (direct) Partner/broker with 30 non-profit human service transportation providers (shuttles, volunteer drivers, door-to-door) 	1986	\$5.6M	37 (of which 7 part-time)	371,000	13 – retired professionals, one elected official, attorney, business people	Tri-Met (transit agency), FTA Section 5311, State cigarette tax, foundations	<ul style="list-style-type: none"> Travel Navigators provide individualized trip planning; Building credibility takes time, but can lead to extensive network of services; providing services in lieu of transit agency can be major revenue generator
Ride-On	San Luis Obispo County, CA	<ul style="list-style-type: none"> Mobility management Direct service provider Volunteer driver program Contract with taxi companies Maintenance Vanpools (including agricultural) 	1987 CTSA, became Ride-On 1992	\$5M	Over 60, including E.D., Ops Mgr, Coordinator, 3 dispatchers, 2 business department, 55 drivers	310,000	14 – transportation professionals, disability advocates, CalPoly	Regional Center, CTSA, profitable services	<ul style="list-style-type: none"> Cross-subsidize revenue generators (tour groups, airport shuttle, weddings) with social service transportation; need anchor contracts e.g. Regional Center, Medi-Cal
Special Transit	Boulder, CO	<ul style="list-style-type: none"> Mobility management Direct service provider (including ADA paratransit) Call-n-Ride (circulators connecting to transit centers) Downtown shuttle Mileage reimbursement program Broker two small volunteer driver programs Travel training 	1997	\$3.2M	230	125,000, plus 980,000 on Hop (downtown Boulder circulator)	17 – 4 elected officials, people influential in private and public sectors, retirees from government agencies	Donations, FTA 5311, City and County, Regional Transit District (transit agency)	<ul style="list-style-type: none"> Develop list of individuals who could influence organizations – designate as potential board members, donors, volunteers Providing services in lieu of transit agency can be major revenue generator
Outreach and Escort	Santa Clara County/ San Jose, CA	<ul style="list-style-type: none"> One-stop call center ADA paratransit provider (no direct delivery) and eligibility screening Paratransit rider fare subsidy program Transit passes Subsidized taxi After-school transportation for CalWORKs children 	1979		27, including 20 in call center	1,000,000	15 – members connected to private industry, university	VTA (transit agency), JARC, TANF, New Freedom, public health funds	<ul style="list-style-type: none"> Cashless pre-paid fare system Emphasis on high-tech and partnerships Stakeholders tend to underestimate fully loaded transportation costs
Paratransit Inc.	Sacramento, CA	<ul style="list-style-type: none"> CTSA and ADA paratransit provider (contract with 15 agencies) Travel training Maintenance 	1978	\$18M	230, including 180 drivers, 25 maintenance	700,000	9 – community members, including 4 disabled, 2 city council members	TDA 4.5, local sales tax, JARC, 5310	<ul style="list-style-type: none"> Revenue generators include maintenance and travel training contracts, plus paratransit provision in lieu of transit agency Contracts with partners do not have penalties, more collaborative approach Highly computerized

Figure 6 Transportation Resources in Monterey County

Organization	Service Type	Service Description	Website	Contact Information	Coverage
Transportation Service Providers					
Monterey County Military and Veterans Affairs Office	Medical Trips	Van service for veterans to the VA Medical Center in Palo Alto and San Jose VA Outpatient Clinic.	http://www.co.monterey.ca.us/va/	(831) 647-7610; zeiglerwc@co.monterey.ca.us	Monterey County
Community Hospital of Monterey Peninsula	Medical Trips	Free transportation to and from medical appointments on the Monterey Peninsula and in Salinas is provided to any patient suffering from a life-threatening illness.	www.chomp.org	(831) 622-2746	Monterey Peninsula and Salinas
Carmel Foundation Transportation Program	Specialized Transportation for Members	The Carmel Foundation's Transportation Program offers door to door service to members for rides within the Greater Carmel Area. Three vehicles, operating 5 days per week to medical appointments. Grocery shopping is provided on Thursdays. Schedule permitting, program assists passengers with non-medically related transportation such as personal business or shopping for those that live outside of the Thursday shopping area.	http://www.carmelfoundation.org/pages/programs/transportation.html	(831) 620-8770	Regions Served: <ul style="list-style-type: none"> ▪ Carmel-by-the-Sea ▪ Carmel Highlands ▪ Carmel Valley – East to Mid-Valley ▪ Monterey – to Canyon Del Rey ▪ Pacific Grove ▪ Pebble Beach ▪ Ryan Ranch
Gateway Center	Specialized Transportation for Clients	Supported living services program has employees who go to homes and provide services. For outings, they provide transportation, and for some consumers, they also provide transportation to doctor's appointments, etc.	http://www.gatewaycenter.org	(831) 372-8002	Monterey Peninsula
Hope Services	Specialized Transportation for Clients	Limited transportation services for their clients. (Unable to verify current state of their transportation services)	http://www.hopeservices.org	(831) 393-1575 ext. 17; afoglia@hopeservices.org	
Interim Inc	Specialized Transportation for Clients	Transport clients for doctor's appointments and other special services. MCHOME is a homeless outreach program where counselors visit sites where they can speak with mentally ill homeless persons to offer services.	www.interiminc.org	(831) 649-4522	
Sally Griffin Active Living Center	Meals on Wheels	Meals-on-Wheels program, delivering meals to homebound, disabled or elderly individuals on the Monterey Peninsula. In addition to meals at the Sally J. Griffin Senior Center.	www.mowmp.org	(831) 375-4454; info@mowmp.org	
San Andreas Regional Center	Specialized Transportation for Clients	To/from home transportation to Adult Program for clients of the Regional Center. If clients are very independent and can navigate within community, they offer CityBus monthly bus passes.	www.sarc.org	(831) 759-7500	

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Organization	Service Type	Service Description	Website	Contact Information	Coverage
Shelter Outreach Plus	Specialized Transportation for Clients	Mobile outreach van which delivers goods and services to clients and I-Help buses which provides transportation to clients.	www.sopinc.org	(831) 384-3388/(831) 384-3388; info@sopinc.org	
Other Transportation Services					
CHAZ (formerly John 23 AIDS Ministry) Central Coast HIV Aids Services	Transportation Subsidies	Provides clients with bus tickets, and clients who reside in certain housing facilities also receive taxi vouchers.	http://www.cchas.org	(831) 394-4747; info@cchas.org.	Monterey County
Commute Alternatives	Information	The program assists individuals who live or work in Monterey County in finding an alternative to driving alone. Commute Alternatives also partners with employers to help them develop and implement alternative commute programs for their employees. The program provides information on carpooling, vanpooling, public transit, bicycling, walking, telecommuting, alternative work schedules, park-and-ride lots, commuter tax incentives, and the Emergency Guaranteed Ride Home Program.	http://www.commutealternatives.info	(831) 422-POOL; info@commutealternatives.info	Monterey County
211, provided through United Way of Monterey County	Information	The United Way of Monterey County launched a 211 service in 2009 to better connect residents of Monterey County to a wide variety of health and human services.	http://211mc.org/quick-links/transportation/	211	Monterey County

